

# Intelligent Advisor Cloud Service: Data Retention

Oracle Intelligent Advisor delivers consistent and auditable advice by capturing rules in natural language and delivering customer service experiences around those rules. Intelligent Advisor is an innovative enterprise policy automation platform that has been designed from the ground up for high performance and secure public cloud deployments, for every customer channel and business process.

## Introduction

Oracle Intelligent Advisor Cloud Service is used by organizations such as financial services companies and government departments. Intelligent Advisor Cloud Service uses customer data to provide advice and make decisions. This document explains how to decide if Intelligent Advisor Cloud Service meets a business's data retention requirements and outlines what to be aware of when deploying Policy Models to Intelligent Advisor Cloud Service.

## Intelligent Advisor Cloud Service – Standalone Usage

When Intelligent Advisor is used standalone, customer data is not persisted in a permanent data store such as a database. For example, a calculator on a banking web site could provide information for anyone considering whether to apply for a home loan at that bank. As part of obtaining this advice, the customer might enter information such as salary and asset details and would reasonably expect that those details are not permanently stored in any way.

When processing web interviews, a standalone Intelligent Advisor site keeps loaded and inputted data in the memory of one or more servers only for the duration of that interview. The data is not stored permanently by Intelligent Advisor Cloud Service and is removed from memory after the interactive session expires. The debug logging feature can be used to temporarily capture data flowing through Intelligent Advisor interviews. If they are not manually deleted, debug logs are automatically purged after 72 hours.

Intelligent Advisor Determinations API also provides decision-making web services that process customer data to return information about eligibility, payments due, amount of rebate to receive etc. These include the *assess service*, which returns decisions and explanations given a set of input data. Data passed to these other services is also never stored in a database.

Note that all data passed to and from the Intelligent Advisor Cloud Service is encrypted in transit using Secure Socket Layer (SSL) encryption via HTTPS.



## POLICY MODELS

Policy models are a collection of files which describe a customer's policy-based rules and other meta-data needed to perform an interview.

## WEB INTERVIEWS

These are deployments of policy models to a cloud-based web application that provide advice and guidance via interactive screens.

## DETERMINATIONS API

This is a suite of web service interfaces that can be activated for any deployed policy model. The interview service returns meta-data about guided data capture and is used by applications requiring user interaction. The assess service provides automated, data-driven, auditable decisions.

## CONNECTOR FRAMEWORK

This is a description of the web services to implement when you want to enable mapping to the data model of a connected application, that loads and saves customer data and manages save and resume during interviews.

## Intelligent Advisor Cloud Service – Connectivity with Other Applications

Oracle Intelligent Advisor Cloud Service *web interviews* can be configured to load and save data from Oracle Service Cloud, Oracle Sales Cloud, or any other cloud or on-premises application. A built-in connector is provided for Oracle Service Cloud. Interaction with the data of other applications is performed by the *connector framework*.

When Intelligent Advisor Cloud Service is connected with another application, the data retention approach of the connected application should be clearly understood.

Note that when errors occur while retrieving data from another application, Intelligent Advisor Cloud Service logs troubleshooting information for the Intelligent Advisor site administrator. Log information includes a record identifier of the data being requested, and may include other data relevant to the error that occurred. Logs are stored in the Intelligent Advisor Cloud Service application database, in accordance with the Oracle Service Cloud data retention policy.

### Policy Model Considerations

It is recommended that authors avoid including information subject to corporate retention policies within rules. For example, rules that contain personal information about particular individuals on a watch-list, for example. Instead, this type of information should be passed to policy automation as input data.

Note that many organizations publish their policies on the web to share with the general public. For example, government legislation, or eligibility criteria for insurance or home loans. Policy Models based on this publically available material can be thought of as an interactive version of these publications.

### Conclusion

Intelligent Advisor Cloud Service reliably manages policies and rules in the Cloud. When used standalone Intelligent Advisor Cloud Service does not store any personal customer data. When data collected by and decisions made using Policy Models are stored in an application connected to Intelligent Advisor Cloud Service, the physical location and data retention policies of the connected application must be reviewed to ensure conformance with data retention requirements.

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